

# Bournemouth & District Lawyer



**Lauren Day (Junior Vice President),  
Mark Proctor (President)  
and Adrian Falck (Senior Vice President)**

**INCLUDED IN THIS ISSUE:**

- How Law Firms Can Adopt AI Safely and Strategically
- Navigating Change: The Work of the BDLS Property Group
- BDLS Lecture Programme



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### BOURNEMOUTH & DISTRICT LAWYER Bournemouth & District Law Society Magazine

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Summer	June 2026	
Autumn	September 2026	

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We welcome your firms' news and any advertisements. Please send to [office@bournemouthlaw.com](mailto:office@bournemouthlaw.com).



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### COVER INFORMATION

Lauren Day (Junior Vice President), Mark Proctor (President) and Adrian Falck (Senior Vice President)

### EDITOR

Mandy Heath  
Bournemouth & District Law Society  
Fir Vale Road, Bournemouth  
Dorset BH1 2JJ  
Tel: 01202 587551  
Email: [office@bournemouthlaw.com](mailto:office@bournemouthlaw.com)

### PUBLISHER

Ian Fletcher  
Benham Publishing Limited  
Aintree Building, Aintree Way,  
Aintree Business Park, Liverpool L9 5AQ  
Tel: 0151 236 4141  
Email: [admin@benhampublishing.com](mailto:admin@benhampublishing.com)  
Web: [www.benhampublishing.com](http://www.benhampublishing.com)





# BDLS CONTACTS

## President

### MARK PROCTOR

Aldridge Brownlee Solicitors  
277 Lymington Road, Highcliffe, Christchurch BH23 5EB  
Tel: **01425 282156**  
Email: [Mark.Proctor@absolicitors.com](mailto:Mark.Proctor@absolicitors.com)

## Senior Vice-President

### ADRIAN FALCK

Preston Redman  
Hinton House, Hinton Road, Bournemouth BH1 2EN  
Tel: **01202 292424**  
Email: [acf@prestonredman.co.uk](mailto:acf@prestonredman.co.uk)

## Junior Vice-President

### LAUREN DAY

Ellis Jones Solicitors  
302 Charminster Road, Bournemouth, Dorset, BH8 9RU  
Tel: **01202 057760**  
Email: [lauren.day@ellisjones.co.uk](mailto:lauren.day@ellisjones.co.uk)

## Honorary Secretary

### ANA DILLING

Rawlins Davy Reeves  
Beechurst, 153 High Street, Poole BH15 1AU  
Tel: **01202 674425**  
Email: [adilling@rawlinsdavyreeves.com](mailto:adilling@rawlinsdavyreeves.com)

## Treasurer

### CONOR MAHER

Ellis Jones Solicitors  
302 Charminster Road, Bournemouth, Dorset BH8 9RU  
Tel: **01202 057867**  
Email: [conor.maher@ellisjones.co.uk](mailto:conor.maher@ellisjones.co.uk)

## Council Member

### PETER WATSON-LEE

Tel: **01425 270502**  
Email: [pwatson-lee@outlook.com](mailto:pwatson-lee@outlook.com)

## BDLS Office Manager

### MANDY HEATH

BDLS Office  
Borough Chambers, Fir Vale Road,  
Bournemouth BH1 2JJ  
Tel: **01202 587551**  
Email: [office@bournemouthlaw.com](mailto:office@bournemouthlaw.com)

# BDLS DIARY 2025/2026

<b>Thurs 23 Oct 2025</b>	<b>BDLS Wine Tasting Evening</b> at The Marsham Court Hotel, Bournemouth SOLD OUT
<b>Wed 12 Nov 2025</b>	<b>Newly Qualified/Trainee Drinks Reception</b> at The Marsham Court Hotel, Bournemouth
<b>Wed 4 Feb 2026</b>	<b>BDLS Annual Lunch</b> at The Pavilion Ballroom, Westover Road, Bournemouth SAVE THE DATE
<b>Fri 24 April 2026</b>	<b>BDLS Annual Dinner</b> at The Highcliff Marriott Hotel, Bournemouth, SAVE THE DATE

# The President's Column

## Mark Proctor



I am delighted to write my first column as President of the Bournemouth and District Law Society. Over the past few months, I have had the pleasure of attending the Dorset Law Society, the Herefordshire Law Society the Hampshire Law Society and the Isle of Wight Law Society dinners, the Southern Area of Law Societies quarterly meeting and, of course, our own Bournemouth and District Law Society AGM. These events have offered a wonderful reminder of the strength, diversity and camaraderie that exists within the legal profession—both here at home and in our neighbouring regions.

The Dorset Law Society dinner was a fantastic evening: full of lively conversation, great food, magic and a real sense of shared purpose across the profession. Herefordshire, Hampshire and the Isle of Wight gave us the warmest of welcomes along with more magic, comedy, music and sunshine—but this is proof, if any were needed, that legal communities, wherever they are, share the same core values of service, resilience and integrity.

The Southern Area of Law Societies meeting is a chance for a number of law societies from across the south to come together and share our thoughts and views on topical matters which are of issue for the profession and enhances the power of our voice in making representations to organisations such as the national law society and the SRA and, to that end, it was great we were joined for the afternoon session of the meeting by the Vice President of The Law Society of England and Wales, Mark Evans.

Our own AGM, meanwhile, gave me an appreciation for the history and vibrancy of our Society. Seeing so many familiar and new faces in the room - members from so many different firms reaffirmed my belief that we are stronger when we work together. Once again, the weather played its part with attendees following the meeting being able to enjoy the sunshine on the riverside terrace at the Captains Club. I would like to extend my thanks to everyone who attended.

As I start my presidential year, I do so with a simple aim: to continue to promote and build on the work of those who have gone before me be it as President or committee member in championing the work that our local law Society does for its members and our engagement with the national law society so that we continue to have our members voices heard at the highest level. There is much to look forward to in the year ahead - from training and mentoring initiatives to social events. I hope you will get involved, share your ideas and help shape the future of our Society. You can find details of our upcoming lectures and social events on the pages within this magazine but also on our website and, of course, you can become a member to sign up to our mailing lists to ensure you remain update on what is going on – contact [office@bournemouthlaw.com](mailto:office@bournemouthlaw.com) for further details.

I am looking forward to meeting as many of you as possible over the next year. ■

### Mark Proctor BDLS President



*Mark Proctor at Hertfordshire Law Society Dinner with The Law Society of England and Wales President, Richard Atkinson*

# BDLS Annual General Meeting

## Captains Club Hotel, Christchurch - Monday 16 June 2025

**This year's Annual General Meeting was held at the beautiful Captains Club Hotel in Christchurch. Guests enjoyed a sunny afternoon with the opportunity to network and take in the stunning riverside views before the formal proceedings began.**

Members were treated to a powerful presentation by Elizabeth Rimmer, CEO of LawCare. Her talk "Navigating and Supporting Mental Health in Your Firm" highlighted the need for a cultural shift in how the legal profession approaches mental wellbeing.

Elizabeth began by outlining the mission of LawCare: to support and promote mental health and wellbeing across the legal community. She emphasised that LawCare is not just a helpline but offers emotional support, information and training to legal professionals at all stages of their careers.

Her presentation focused on three key areas:

**1. Practical Steps for Firms:** Elizabeth shared strategies that firms can implement to foster a healthier work environment. These included encouraging open conversations about mental health, providing access to support resources and a flexible approach to how people work.

**2. The Role of Leadership and Supervision:** She stressed the importance of good people management, noting that supervisors and senior staff play a crucial role in setting the tone for workplace culture. Training managers to recognise signs of stress and burnout and to respond with empathy and support is essential.

**3. Regulatory Pressures and Mental Health:** Elizabeth acknowledged the unique pressures faced by legal professionals, including the demands of regulatory compliance and the evolving expectations of clients and colleagues. She urged firms to be mindful of how these pressures impact staff wellbeing.

It was a fitting prelude to the AGM itself, reminding all present that the health of the profession depends not only on legal excellence but on the wellbeing of those who practice it. For more information about LawCare and the support it offers, visit [www.lawcare.org.uk](http://www.lawcare.org.uk)

Following Elizabeth Rimmer's presentation Nick Gallagher, CEO of The Solicitors' Charity, reflected on the impactful work it was doing. Drawing on insights from the soon-to-be-released Big Report—hot off the press—Nick shared compelling highlights that underscored the Charity's growing role in supporting the legal profession with a range of wellbeing services.

The Big Report revealed a large increase in solicitors helped compared to the previous year with a notable rise in support for those facing health conditions and mental health challenges. £1.2m in awards were made to solicitors and their dependents which included direct financial aid, psychotherapy sessions and career coaching. All this helped legal professionals navigate issues ranging from debt and unemployment to housing instability.

Nick also introduced an exciting new initiative: a membership product aimed at law firms and suppliers to the legal sector, called Firm Friends. This offering is grounded in recent research involving over 100 sector leaders and suppliers, which found that 8 in 10 believe legal charities like The Solicitors' Charity should be supported by the profession. The membership scheme aims to formalise that support offering firms a meaningful way to contribute to the wellbeing of their peers. The Charity will circulate more details to members when they are available.

Nick encouraged attendees to follow up after the AGM to learn more about how their firms can get involved and help build a more resilient legal community. Please contact Nick direct at [Nick@thesolicitorscharity.org](mailto:Nick@thesolicitorscharity.org) for information about the support offered and how you can get involved with helping the profession via Firm Friends and, of course, the donation of unclaimed client balances.

For further details, visit [www.thesolicitorscharity.org](http://www.thesolicitorscharity.org)

### General Committee Appointments 2025/2026

The AGM commenced shortly afterwards with the following appointments:

**President:** Mark Proctor, Aldridge Brownlee  
**Senior Vice President:** Adrian Falck, Preston Redman  
**Junior Vice President:** Lauren Day, Ellis Jones  
**Honorary Secretary:** Ana Dilling, Rawlins Davy Reeves  
**Honorary Treasurer:** Conor Maher, Ellis Jones  
**Assistant Honorary Secretary:** Emily Green, Trethowans



# BDLS Annual General Meeting

## Captains Club Hotel, Christchurch - Monday 16 June 2025

In addition, the following General Committee Members were appointed who will each serve a term of three years:

**Daniel Stanton**, Preston Redman  
**Helen Clement**, Lester Aldridge  
**Jean Cross**, Woodstock Legal Services

We hope that they all enjoy their terms of office with the Society.

### Presidential Remarks

Newly appointed President, Mark Proctor, expressed a strong commitment to promoting inclusivity throughout his tenure. He takes great pride in the BDLS lecture programme, recognising it as a key platform for advancing

professional development within the society. Mark is also eager to foster deeper member engagement through the society's social events, aiming to ensure that BDLS remains relevant, resilient, and inclusive for all. ■

**MANDY HEATH**  
 BDLS Office Manager



*Newly Appointed General Committee Members: Helen Clement, Jean Cross and Dan Stanton*



*Amy Cousineau Massey, Matt Lewis and Sandra Graham*



*Chris Twaits, Adrian Randall and Suki Samra*



*Karen Watts and Jo Clarke*



# BDLS Annual General Meeting

## Captains Club Hotel, Christchurch - Monday 16 June 2025



George Crofts and Michael Newbold



Mark Proctor with Elizabeth Rimmer, CEO of LawCare



Anna Curtis, Marie Harder, Emily Jordan and Byron Sims



Kelvin Murarari, Julian Heath, Owen Baker, Mark Proctor, Clare Eastwood and Nicola Bennetts



Mark Proctor with Nick Gallagher, CEO of The Solicitors' Charity



John Newbold and Nigel Smith



# THE LAW SOCIETY OF ENGLAND AND WALES BICENTENARY NETWORKING DRINKS RECEPTION

Marsham Court Hotel, Bournemouth - Thursday 10 July 2025



**T**o mark the bicentenary of The Law Society, members of Bournemouth & District Law Society and Dorset Law Society gathered for a celebratory drinks reception at the beautiful Marsham Court Hotel, with stunning views of the coastline.

The event formed part of the Law Society's nationwide bicentenary tour - a year-long celebration of connection, reflection, and engagement with members across England and Wales. Over the course of the year, Law Society office holders have visited more than 25 locations domestically and internationally, including Bournemouth, to honour 200 years of supporting solicitors and upholding the rule of law.

The evening was made even more special by the presence of Mark Evans, Vice President of The Law Society, who delivered an engaging and thoughtful talk reflecting on the Society's history and its evolving role in the legal profession. His visit underscored the importance of regional law societies as partners in progress and highlighted the vital role local solicitors play in their communities.

It was a memorable evening of celebration, connection and reflection on two centuries of legal excellence — and a reminder of the strength and unity of our profession, both locally and nationally.

**Please see full article on The Law Society's Bicentenary Year on page 23 of this Magazine.**



*Mark Evans, Vice President of The Law Society of England and Wales  
with Mark Proctor President, BDLS*

**MANDY HEATH**  
BDLS Office Manager

# BDLS AN AUTUMN EVENING OF WINE TASTING

Thursday 23 October 2025 17:45 to 20:30 Marsham Court Hotel, Bournemouth



Join colleagues, friends and fellow member of BDLS for a relaxed and informative evening when expert sommelier, Gemma Withenshaw, of VinGin will expertly guide us through a variety of exquisite wines. For the fantastic price of £25, the evening will include a tasting of six wines, including champagne, and a cheeseboard.

Wine lovers of all levels welcome! Join us for an evening filled with good wine and great company.

Limited tickets available so book your tickets early! Book your places here: <https://www.bournemouthlaw.com/events>

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## BDLS TRAINEE & NEWLY QUALIFIED LAWYERS DRINKS RECEPTION

Wednesday 12 November 2025 17:30 – 19:30  
Marsham Court Hotel, 3 Russell Cotes Road, Bournemouth

Bournemouth & District Law Society (BDLS), in collaboration with Bournemouth & District Junior Lawyers Division (BDJLD), is delighted to host this drinks reception for the next generation of legal professionals. This event is open to:

- Trainee solicitors
- Solicitor apprentices and those studying for the SQE
- Trainee CILEX members
- Solicitors/CILEX qualified within the past 12 months

Join us for an opportunity to learn about BDLS and BDJLD's activities, connect with peers, share experiences and build your professional network in a friendly and informal setting.

If you would like to attend, please email [mandy@bournemouthlaw.com](mailto:mandy@bournemouthlaw.com) to reserve your place

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# BDLS

## Annual Lunch

Wed 4 February 2026  
The Pavilion, Bournemouth

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Guest Speaker

**Rev Richard Coles**



# BDLS

## Annual Dinner

Friday 24 April 2026  
Highcliff Marriott, Bournemouth

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Guest Speaker

**Mark Evans**

Vice President, The Law Society of England & Wales



We are finalising the details for these prestigious events and full details will be circulated to members soon. In the meantime, please save the dates.

# NAVIGATING CHANGE: The Work Of The BDLS Property Group

As Chair of the Bournemouth & District Law Society Property Group, Martyn Hudson has worked tirelessly over the past few years to guide the profession through an exceptionally challenging period from navigating the complexities of the Building Safety and Fire Safety Acts, to responding to the collapse of Initiative Property Management and addressing the ongoing issues with BCP Council's local search performance.

We are incredibly grateful not only to Martyn, but also to his dedicated Committee, David Walton, Tony Mellowes, Clare Hallett, David Blackmore, and Alex Eddy - whose collective expertise and thoughtful collaboration have been instrumental in tackling these issues. Their work has ensured that the voices of local practitioners are heard.

BDLS would like to extend their sincere thanks to Martyn and the Committee. Their efforts exemplify the very best of what our professional community can achieve when we work together.

Martyn has kindly provided the following report, offering a detailed overview of the key issues the Committee has faced - and the vital work they continue to do on behalf of us all.

## **BDLS Property Group: A Three-Year Review of Key Legal and Sector Challenges**

Over the last three years, this Property Group Committee has seen more than its fair share of serious issues to consider and try to do its best for BDLS members. I summarise these below:

### **Building Safety Act and the Fire Safety Act 2022**

The first serious issue to arise were the implications coming out of the Building Safety Act and the Fire Safety Act 2022, which had consequences for the vast majority of the blocks of flats in this area. These two Acts, between them, whilst probably well intentioned and meaning, caused serious practical and legal issues for the profession locally.

The term "high rise" took on a new and fairly sinister meaning within the context of acting for Buyers and Sellers. BDLS put on many meaningful and informative lectures on each subject, which resulted primarily in a large number of local firms deciding not to get involved in the conveyancing process, for anything that qualified as high rise! The lectures made it clear what the dangers were in doing so, if you engaged in that market. It would still seem to be the dominant view amongst local conveyancers. There are some exceptions!

## **Initiative Property Management**

The next issue arising was the demise of Initiative Property Management locally, and the discovery of some very serious criminal acts, perpetrated as part of that situation.

Substantial amounts of money were stolen from the client account of that Managing Agent, by its proprietors/owners/senior management, and it looks as though that money has successfully been transferred abroad, probably never to be seen again, together with those who did it.

Whilst the Police engaged seriously in the investigation, it looks as though they will be relatively powerless to do very much about it. Some minor arrests have been made, but none of the major players have been brought to justice, or are likely to be, sadly.

Blocks affected by these thefts, have had varying degrees of success in sorting themselves out. A number, who remained with the same insurers the following year, were able to put some sort of compensation claim in for the theft and have received appreciable amounts by way of reimbursement. Others have not been so lucky and have had to meet the loss they suffered by further calls upon their members. A very sad state of affairs.



Over 170 blocks, 2000 flats, would appear to have been affected by these events. The Police were issuing regular news bulletins to those involved, but these now seemed to have stopped, as no further headway is likely to be made with the investigation.

### New Conveyancing Forms – TA6 and TA7

We then had to consider some new conveyancing forms, mainly the CQS TA6 and TA7 revisions, that took into account the requirement for mandatory information when that was being proposed. The profession, generally throughout the country, objected to these new forms considerably and, as a result, the Law Society of England & Wales had to reconsider the forms and their content.

Revised versions are in circulation and seem to be much more acceptable. MI is now on the backburner for the time being.

### Change of Government Laws and Regulations

Following the change of Government, new laws and regulations have been passed by Parliament - withdrawn, repealed, changed, and eventually I guess, something we can all get stuck into will emerge. However, for the moment, things like leasehold/commonhold issues are still in abeyance. Lease extensions and freehold enfranchisement are uncertain to say the least and, when you add into that mix the high rise controversy resulting from the two Acts in 2022, leasehold conveyancing has never been more difficult than it is now, for the time being at least.

### BCP Council

The latest crisis, a familiar word in the conveyancing process, arises from the poor performance of BCP Council, regarding their Local Search Department. They have also performed poorly in the provision of new houses in this district (22% of target apparently). So, combining these two low points, both domestic and commercial conveyancing departments are suffering badly from the result.

BCP Council is well down the National League Tables of performance, possibly even bottom, in the provision of local searches. It was not that long ago when they could get a search back to you in 4 to 5 days. Now it is 45 days, and a disaster for the conveyancing process. Even doctors are beginning to report patients that are being treated for stress as a result of slow search delivery. It is that bad.

Arising from various suggestions by members of my Committee and, in particular, serious input from Clare Hallett and David Blackmore who attended a meeting with the Council to put forward our serious concerns at their poor performance, this issue would now appear to be on the Council agenda to sort out, and slightly better performance is being tracked at the moment! It will have to come down to under 20 working days before it would be remotely acceptable and, hopefully, back to the national average of between 5 to 10 working days.

Planning Consents must also increase or there will be no newly created domestic and commercial units to add to the housing stock in the area.

This is a current, serious, and ongoing situation which we are monitoring every two weeks, with reports coming in from the Council, and search providers giving us feedback on the actual outcome. We will continue our monitoring process until an acceptable result arises.

I would like to thank the committed input that I have received from my Committee members, namely David Walton, Tony Mellowes, Clare Hallett, David Blackmore and Alex Eddy. Without their knowledge, commitment, input, and helpful thoughtful attitude throughout the last years, it would have been a much harder task to undertake. It has enabled serious and worrying issues that have arisen to be addressed, with some sensible outcome resulting. The quality of debate at Committee meetings is exceptional, and the pooling of the collective knowledge helps get us through most of the problems we face. I am indebted to them, each and every one of them.

Lastly, it would not be fair for me to write a report of this nature without thanking two people from the parent society. Our President, Mark Proctor, has stepped into the local search debacle and has been the "tip of the sword" when it comes to confronting the CEO of BCP Council. A grateful thanks to him for making himself available and doing whatever we requested of him to make things happen.

Lastly, but never least, is the help that we get as a Committee and our local Law Society generally, from the lovely Mandy Heath, who never fails to support any suggestion or request that we have of her, and is the person who makes the Society function at a very high standard. When you add in the other committees and, in particular, the education lectures that we offer, she does an amazingly good job, and we thank her for it publicly.

This is a summary of what the Committee has had to deal with over the last three years. It has not been easy but with the willingness and cooperation of the members of the Committee who were happy to invest their personal time and effort into sorting out the problems we face, there is every chance that we will stand a fighting chance as things evolve in the future.

Our crystal ball is rather cloudy at the moment and trying to spot the next problem and how to deal with it is less easy year on year.

If any BDLS member has the opportunity to meet the Committee members mentioned above, a word of thanks for their dedication and hard work would be most welcome ■



**Martyn R Hudson**  
Chair, BDLS Property Group



BOURNEMOUTH & DISTRICT  
JUNIOR LAWYERS DIVISION



# Bournemouth & District Junior Lawyers Division



**A**s the BDJLD Committee year comes to a close, I just want to take a moment to say a big thank you to my brilliant committee, who have made my role as President so much easier; I simply could not have done the role without as good a committee as I've had and I am really grateful for the time and energy you have put in. A quick look at what's coming up and some recent highlights:

## Thinking About Joining the Committee?

We will be opening up applications to join the 2025/26 Committee soon, with our AGM taking place in mid-to-late October. If you are thinking about getting more involved, I can't recommend it enough. It's a great opportunity to meet people across the local and national legal community, help shape the year ahead, and gain some really valuable experience along the way.

## A Day at the Races (Win or Lose)

Our return to Salisbury Racecourse for Day at the Races, kindly sponsored by 3PB Chambers, was a real highlight. The weather held out, the company was excellent... and the betting? Well, let's just say I think one of my horses is still running. A great day all round, even if most of us didn't come home any richer.

## A Brilliant Summer Ball

We were also thrilled to bring back the BDJLD Summer Ball, which took place at the Carlton Hotel in Bournemouth on Friday 1 August. A huge thank you to our sponsors — Ellis Jones Solicitors, 3PB, and Wilson & Roe — for their support, and an even bigger thank you to Daisy Kershaw and her team who pulled it all together. It was a fantastic evening and a great way to round off the summer.

## Supporting the Water Lily Project

This year's Ball also helped raise £1,000 for our chosen charity, The Water Lily Project — a fantastic local organisation supporting women in the BCP area who are rebuilding their lives after domestic abuse, mental health challenges, or personal crisis. That donation equates to around 50 hours of direct support, which is something we're all really proud of. If you would like to learn more about what they do, head to their website and have a read.

This is my last article as BDJLD President, and I just want to say some 'Thank you's' - to my Committee, whose support and efforts I will be eternally grateful for, to the BDLS Committee for welcoming me and to whom I hope I've been able to contribute back, to my firm for championing me and the rest of the committee from Ellis Jones, and to our members for getting involved and coming along to our events. A final thank you to Mandy Heath — if you've been around the BDLS you will know just how much work Mandy puts in to make things work smoothly, and her support this year has been a blessing. It's been a genuinely rewarding experience, and I'm looking forward to seeing where the next committee takes things from here. ■

## Matt Rushent

President for the BDJLD

<https://www.bdjld.co.uk/>





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# Beyond the Software:

## Colin Bohanna Talks About Empowering Legal Professionals Through Tech

**“Customer-First Isn’t a Strategy, It’s a Culture” confirms Dye & Durham’s new MD**

Dye & Durham has appointed Colin Bohanna as its new UK Managing Director, ushering in a new era of regional focus and customer-centricity for one of the country’s leading legal technology providers.

With over 20 years’ experience spanning Oracle, Indeed, Clio and mentoring several high-growth startups, Colin brings a rare mix of commercial acumen and leadership depth to the role. His appointment comes at a pivotal moment for Dye & Durham as it moves to a regional operating model that reflects the unique needs of the UK legal sector and unifies its extensive portfolio of acquired technology and service brands.

“This is a business with an incredible foundation,” Colin says. “We’ve brought together some of the UK’s most respected tech and service providers. Now we have the opportunity to deliver all of that experience, knowledge and innovation under one brand and that’s a very strong proposition. It’s one I’m really proud to lead.”

Since joining, Colin has focused on operational efficiency and customer experience. The introduction of a centralised support system has helped streamline service, drive first-contact resolution and improve consistency across the organisation, closely aligning with his priorities. The result? Faster answers, better outcomes and a stronger connection with customers.

“Customer-first isn’t just a strategy, it’s a culture,” he adds. “Everything we’re doing, from internal realignment to external engagement, is about making it easier for firms to work with us and succeed.”

Looking ahead, Colin is optimistic about the opportunities for legal professionals particularly in how they can harness innovation without losing focus on client value.

“AI is a huge conversation in the industry right now, and rightly so,” he says. “It has the potential to create big efficiency gains but it also challenges traditional business models like the billable hour, for example. What matters is how we help firms adopt it thoughtfully, making sure tools are fit for purpose, secure and genuinely improve the client experience. That’s where Dye & Durham has a real role to play.”

Outside of work, Colin is equally committed to helping others grow. He’s mentored start-up founders through Enterprise Ireland for nearly a decade, offering commercial and structural advice to early-stage businesses.

“I’ve always been very passionate about mentoring,” he explains. “Start-ups are driven by brilliant ideas, but they often need help scaling commercially. Whether it’s in business or with the teams I lead, I love supporting people to unlock their potential.”

That philosophy carries through to his home life, too. “These days, most of my spare time is spent on the sidelines watching my daughter play football,” he laughs. “There’s a lot of crossover - it’s about backing talent, creating the right environment and being there to cheer people on as they find their stride.”

Looking ahead, Colin’s vision for Dye & Durham UK is clear: a trusted, agile partner delivering practical tech that makes life easier for legal professionals. “We’re here to help firms grow faster and with less effort. That’s what we’re building and we’re already seeing great momentum.” ■

### About Dye & Durham Limited

Information on Dye & Durham UK can be found here: [www.dyedurham.co.uk](http://www.dyedurham.co.uk).



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The screenshot displays the Unity Practice Management Dashboard for Ellen Brown. The interface includes a sidebar with navigation options like 'Clients & Cases', 'Organiser', 'Documents', 'Time', 'Money', 'Reports', and 'Conveyancing Solutions'. The main dashboard area shows a welcome message, a search bar, and several key performance indicators (KPIs) for 'All Fee Earners'. These include Active Cases (5831), Unbilled Time (953h 56m), Compliance (30 Client Breaches, 43 Office Breaches), and Debtors (£654,326.44 Unpaid Bills, £64,429.41 Unbilled Disb). A 'Recent Cases' section lists 'Purchase - 7 Elm Grove, Rhyll' and 'TEST MATTER STONE Roys Mr (Search-Update)'. A 'Sales Actual Vs Budget' chart is also visible at the bottom right.

Showing stats for: All Fee Earners	
<b>Active Cases</b> 5831 Active Cases →	<b>Unbilled Time</b> 953h 56m Time Pending £296,223.29 Work In Progress →
<b>Compliance</b> 30 Client Breaches → 43 Office Breaches →	<b>Debtors</b> £654,326.44 Unpaid Bills £64,429.41 Unbilled Disb

Recent Cases	
Purchase - 7 Elm Grove, Rhyll Turner India Mrs	TUR0031
TEST MATTER STONE Roys Mr (Search-Update)	STD0051

**Sales Actual Vs Budget**

Chart showing Budget (KT,595,400) and Actual performance over time.



# BDLS Lecture Programme 2025

## KEY:

LIVE WEBINARS

FACE TO FACE LECTURES



Kindly sponsored by



DATE AND TIME	LECTURE	FORMAT	LECTURER	VENUE
4 September 2025 11:00 – 12:30	<b>Deliberate Deprivation for Social Care</b>	Live Webinar	Caroline Bielanska	Zoom
23 September 2025 11:00 – 12:00	<b>The Small Sewage Discharge Binding Rules – 10 Years On</b>	Live Webinar	James Warren	Zoom
25 September 2025 12:00 – 13:00	<b>AI in Business: Risk, Opportunities and Impact</b>	Live Webinar	Luke Williams	Zoom
29 September 2025 11:00 – 11:30	<b>Managing Risk: Working with Suicidal and Vulnerable Clients under SRA Standards</b>	Live Webinar	David Green	Zoom
6 October 2025 11:30 – 12:30	<b>Building Regulations for Conveyancers</b>	Live Webinar	Richard Snape	Zoom
8 October 2025 09:00 – 17:00	<b>Private Client Conference</b>	Face to Face	Various	Marsham Court Hotel
14 October 2025 11:00 – 12:00	<b>Importance of Understanding Risk Surrounding SDLT in Conveyancing</b>	Live Webinar	Amanda Perrotton	Zoom
5 November 2025 TBC	<b>Legal Intelligence – Practicing Law in the Age of AI</b>	Face to Face	Various	TBC
6 November 2025 11:00 – 12:00	<b>Love, Law and Letting Go - the Complicated Affair of Joint Ownership</b>	Live Webinar	Paul Sams	Zoom
26 November 2025 09:15 – 17:00	<b>Property Conference</b>	Face to Face	Various	Marsham Court Hotel
3 December 2025 14:30 – 16:30	<b>Implementation of the Renters' Rights Bill/ Act 2025 – an Update for Litigators</b>	Face to Face	Conor Maher	Marsham Court Hotel

# BDLS Lecture Programme 2026

DATE AND TIME	LECTURE	FORMAT	LECTURER	VENUE
15 January 2026 11:00 – 12:00	<b>Topic to be confirmed</b>	Live Webinar	Ian Quayle	Zoom
22 January 2026 11:00 – 12:00	<b>Law Firm Growth, Profit and Client Development Strategies for Legal Professionals</b>	Live Webinar	Jay Sahota	Zoom
27 January 2026 11:00 – 12:00	<b>Imposter Syndrome and How to Manage It</b>	Live Webinar	Jess Wiggins	Zoom
11 February 2026 09:30 – 12:45	<b>Topic to be confirmed</b>	Face to Face	Helen Forster	Marsham Court Hotel
11 February 2026 14:00 – 17:15	<b>Topic to be confirmed</b>	Face to Face	Helen Forster	Marsham Court Hotel
26 February 2026 14:00 – 17:15	<b>Topic to be confirmed</b>	Face to Face	Tracy Thompson	Marsham Court Hotel

All lectures are to be booked online. For further details please visit Bournemouth and District Law Society Website.

[www.bournemouthlaw.com/lectures](http://www.bournemouthlaw.com/lectures) or scan here: ■



## Course Notes

For environmental reasons, BDLS will no longer be providing printed course notes at lectures. Lecture notes will be emailed to delegates in advance for either printing or accessing via their laptop or alternative device on the day.

## Payment for lectures

Please note: Payment must be received at the office before the lecture takes place. All payments are to be paid by BACS. Course bookings will only be confirmed upon payment. Webinars are charged per person and not for group bookings.

## Cancellation Policy

No refunds will be given for any booking cancelled within two days of the lecture/webinar taking place.

We strive to offer our members a range of lectures not just covering competency “B” – Technical Legal Practice but also to meet the wider competencies which all solicitors need to state annually they are meeting. The 4 competencies are:

- A – Ethics, Professionalism and Judgement**
- B – Technical Legal Practice**
- C – Working with other people**
- D – Managing yourself and your own work**

For further information:

<https://www.sra.org.uk/solicitors/resources/continuing-competence/cpd/competence-statement/>. ■

# Summary of Upcoming Live Time Lectures and Webinars

## WEBINAR Thursday 4 September 2025 – 11:00 – 12:30

Topic **IN A NUTSHELL – DELIBERATE DEPRIVATION FOR SOCIAL CARE**

Lecturer **Caroline Bielanska**

Cost **£60 – Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices)**  
**£85 – Non Member of BDLS**

■ Care costs are expensive, and many clients may find themselves without sufficient money to fund their own care and so seek local authority help. In all cases, local authorities will now look at the person's financial position going back into to see if the person has previously made gifts with the intention of reducing the amount they will subsequently pay for their care and support needs.

This session is aimed at all professionals who advise on the making of gifts or where clients have now run out of money and are being denied local authority funding and will strengthen your client's ability to challenge an adverse decision

The session will cover the following:

- Understanding when deliberate deprivation is relevant
- Identifying what cannot be treated as a deliberate deprivation
- Understanding the components of deliberate deprivation, including purpose and timing
- Increase awareness of when a deprivation can be inferred
- Identify when a gift can be made when already in receipt of care
- Update on Local Government Ombudsman decisions



## WEBINAR Tuesday 23 September 2025 – 11:00 – 12:00

Topic **THE SMALL SEWAGE DISCHARGE BINDING RULES – 10 YEARS ON**

Lecturer **James Warren**

Cost **£35 Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices)**  
**£55 Non Member of BDLS**

■ This webinar will include:

- An overview of the General Binding Rules (GBRs) – why was it introduced, by who and when.
- What is a 'Small Sewage Discharge'.
- What do the GBRs mean to property owners served by 'private' off mains drainage systems.
- What is a non-compliant system, what needs to happen when one is discovered and who's responsible.
- When an EA permit is required and where Planning and Building Control come in.
- What a specialist can do to help and why it's important.



# Summary of Upcoming Live Time Lectures and Webinars

## WEBINAR Thursday 25 September 2025 – 12:00 – 13:00

Topic **AI IN BUSINESS – RISK, OPPORTUNITIES AND IMPACT**

Lecturer **Luke Williams**

Cost **FREE for Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices) and £15 Non Member of BDLS**

■ This educational webinar is designed for anyone interested in expanding their knowledge of AI. This webinar will cover:

- An overview of the current capabilities of AI.
- Likely impact on the working environment and workforce.
- Talent development, adaption and training.
- Risks and Opportunities from AI.



## WEBINAR Monday 29 September 2025 – 11:00 – 11:30

Topic **NAVIGATING RISK: WORKING WITH SUICIDAL AND VULNERABLE CLIENTS UNDER SRA STANDARDS**

Lecturer **David Green**

Cost **£20 Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices) and £35 Non Member of BDLS**

■ This webinar will cover:

1. SRA and vulnerable clients
2. Confidentiality and issues to consider
3. Managing clients
4. Staff welfare
5. Summary
6. Q&A



## WEBINAR Monday 6 October 2025 – 11:30 – 12:30

Topic **BUILDING REGULATIONS FOR CONVEYANCERS**

Lecturer **Richard Snape**

Cost **£35 Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices) and £55 Non Member of BDLS**

■ Building regulations is becoming an increasingly important part of conveyancing. The course aims to look at some of the issues. Topics covered include:

- Building regulations enforcement and changes in England in October 2023
- Exemptions from building regulations
- Septic tanks; building regulations and registration
- The Water Industry (schemes for adoption or private sewers) Regulations 2011
- Solar panels
- Part P building regulations
- Building Safety Act 2022 and changes to building regulations in April 2024





# How Law Firms Can Adopt AI Safely and Strategically

The only constant in AI is change. New models and tools are developed continually promising game-changing efficiency or existential risk depending on who you chose to listen to. In regulated professions many are taking a wait-and-see approach, as debate continues over whether AI is just hype or a fundamental shift.

**With so much uncertainty, how can law firm leaders make an informed, strategic choice that is both pragmatic and future proof?**

AI introduces distinctive challenges; although current IT policies address most potential risks through data security measures, implementing a dedicated AI Statement establishes clear direction and parameters for the adoption of AI best practices.

An often-shared example is when asked how many 'R's are in the word 'strawberry', many AI models respond with two, despite the correct answer being three. This kind of mistake might seem surprising, but it reveals something important about how these systems work.

This happens because AI breaks words into chunks (tokens), not individual letters. It doesn't "see" the word as we do. Sceptics cited this as proof AI was useless, failing at a seemingly simple task, the reality is that AI models are at their core just a very clever autocomplete and not designed to work in that way.

Failure to understand how AI works, and the guardrails you need to put in place to use it effectively can also lead to situations like happened in the £89m damages case against the Qatar National Bank, the claimants made 45 case-law citations, 18 of which turned out to be fictitious\*.

AI was working correctly. It predicted the most likely next combination of words, like an auto-complete, for the task it was given. It produced citations when it didn't have access to them in the data it was trained on.

Using specialist legal tools which will only cite real case law, or having basic checks in place on the accuracy of information could easily have prevented this happening.

\*source: <https://www.theguardian.com/technology/2025/jun/06/high-court-tells-uk-lawyers-to-urgently-stop-misuse-of-ai-in-legal-work>

That's one reason why we're firm believers that the starting point for adopting AI in an organisation lies in having an agreed AI Statement. A guiding document that sets out how you will, and will not, use AI. It acts as a foundation to ensure your business uses AI effectively, legally and ethically.

As models continue to improve, an organisation's use of AI is as much a brand decision as a technology one. Transparency in how we use AI is essential for building client trust and we're starting to see questions on AI tool usage in the procurement process across a range of industries.

A first step for AI adoption in an organisation must be setting clear guidance for your team to help them to know how to use these new tools safely, legally and effectively while communicating your values effectively to suppliers and partners.

**How your firm uses AI sends a message, what do you want it to say?**

Join me to explore this topic further at the upcoming FREE Webinar (Non-members £15):

AI in Business – Risk, Opportunities and Impact  
Thursday 25 September 2025 – 12:00 – 13:00

Book your places here:

<https://www.bournemouthlaw.com/bournemouth-district-law-society-lectures> ■

**Luke Williams**

Group Head of AI  
Intergage Group Ltd



## Celebrating 200 Years: regional connections at the heart of the Law Society's bicentenary



*Celebrating 200 years on the Isle of Wight*

**2**025 has marked a historic milestone for the Law Society of England and Wales: two centuries of supporting solicitors and upholding the rule of law. To honour this remarkable legacy, and the vital role of our members, we launched a celebration filled with events, insights and meaningful engagement across England and Wales and beyond.

### A year of connection and celebration

If there's one word that defines the bicentenary year, it's connection. From bustling cities to coastal communities, the Law Society has been on the move – reaching out, listening to, learning from and celebrating with members across England and Wales. Over the past several months, Law Society staff and office holders have visited 25 locations, participating in 46 engagements. These have included roundtables and seminars, networking and lunch events, panel discussions and university talks, networking receptions and evening celebrations and an admissions ceremony. Each stop on the tour has been an opportunity to reflect on the past, discuss the issues that matter most to our members at present, and discuss the future of the legal profession.

### A nationwide journey

The regional tour has taken in a rich tapestry of towns and cities: Exeter, Truro, Falmouth, Plymouth and Bristol in the Southwest; Nottingham, Derby, Leicester and Birmingham in the Midlands; Leeds, Sheffield and York in Yorkshire; Newcastle in the Northeast; Cambridge, Ipswich and Norwich in the East; Manchester and Liverpool in the Northwest; and Cardiff and Llandudno in Wales. Alongside our London evening celebration, the programme concluded with visits to Brighton, Southampton, Bournemouth and the Isle of Wight in the South.

Whether working as independent advisors or within businesses, solicitors support their local communities to navigate difficult legal problems and identify solutions.

The variety of engagements held in each location have sparked vibrant conversations about the profession's future – touching on key themes such as economic growth, AI and legal tech, talent, access to justice and the rule of law, regulation, and equality, diversity and inclusion. From the high street to the high court, we will continue to support you with the issues that matter most, and champion the impact you make nationally and in your local communities.

### Local law societies: partners in progress

Local law societies have played a pivotal role throughout the bicentenary tour. Their collaboration, insight and enthusiasm have helped shape events that truly resonate with local communities. Whether through panel discussions, receptions, or outreach initiatives, these partnerships have underscored the power of regional leadership and the importance of continued collaboration.

### A global perspective

The celebrations haven't stopped at the UK's borders. The UK's legal profession is a global powerhouse and a British success story – a true global brand that is recognised and respected the world over thanks to the stability and quality of our courts, our laws, and legal professionals in towns and cities across England and Wales. During the bicentenary, we have connected with our international members, hosting events in Singapore, Brussels, Hong Kong, Dubai and New York. These global engagements have highlighted the international strength of the solicitor profession and opened doors for continued cross-border collaboration, and we will keep pushing for more opportunities for our sector to reach its full global commercial potential.

### Championing the profession

Back home, the Law Society has released a snapshot report examining the current state of the legal profession, highlighting its role as a driver of economic growth and force for good.

Engagement with policymakers has also been front and centre, with a parliamentary reception in March attended by the Lord Chancellor and

Secretary of State for Justice, and a London celebration in June which welcomed the Solicitor General as a keynote speaker.

### What's next?

Though our regional tour has ended for this year, our bicentenary celebrations will continue through to the end of 2025. On Saturday 13 September, the Law Society will open its doors to the public as part of London's Open House Festival, a chance to step into a rich and fascinating history and witness the architectural wonders of the Law Society's Grade II\* neo-classical building. Also on the horizon is a hybrid in-conversation event with renowned journalist Emily Maitlis, who will join a panel of experts to explore why the rule of law matters to us all. Those who haven't been able to get an in-person place are still able to watch live online. We are also proud to be collaborating with renowned British artist and Turner Prize winner Helen Cammock on a landmark commission. Helen will create a powerful and original artwork that commemorates the Law Society's 200th anniversary. This legacy will embody the values of the Law Society and highlight how the legal profession has evolved over the last two centuries. To stay updated, book events, or explore content please visit the Law Society's bicentenary hub.

### Looking beyond 2025

While this year marks a significant milestone, it's also a springboard for the future. The Law Society is committed to continuing its regional engagement into 2026 and beyond, with plans already forming for further visits across England and Wales. If your local law society would like to discuss a visit to your area in 2026, please contact [beth.quinn@lawsociety.org.uk](mailto:beth.quinn@lawsociety.org.uk) ■

**Beth Quinn**  
Member Engagement Manager  
The Law Society of England and Wales





# The Council Member's Report

**PETER WATSON-LEE**

Law Society Council Member for Dorset

## Extraordinary Times

The fallout from the Axiom Ince debacle rumbles on. As you'll recall, this is the firm from which £60 million in client funds mysteriously vanished, triggering a massive claim against the solicitors' compensation fund—an expense we'll all be contributing to.

Despite initial efforts by the SRA to sidestep accountability, the Legal Services Board—our regulatory top dog—has issued a series of Binding Directions to the SRA. This represents a serious sanction.

Meanwhile, we await the report into the collapse of another firm called SSB Law. The expectation is that it may prove even more toxic and more damning in its assessment of the SRA.

## Departures Galore at SRA and LSB

It's hard to believe that the exodus of senior leaders from our regulators is purely coincidental. Paul Philip, longtime Chief Executive of the SRA, is "retiring." In recent months, several other senior executives have quietly exited. The one constant is Anna Bradley, Chair of the SRA Board, who held a leaving party last year—only to be reappointed, presumably to steer through the incoming tide of change.

Over at the Legal Services Board, the Chair stepped down earlier this year citing "personal considerations." More disappointing is the sudden and unexpected resignation of the Board's relatively new Chief Executive—the very individual who had held the SRA to account over Axiom Ince.

## New SRA Chief

Sarah Rapson has now been appointed Chief Executive of the SRA, receiving the £414,800 salary the post pays (financed by our practicing certificate contributions). Unfortunately, there's no sign that she has any experience of legal practice or the solicitor's profession. Formerly a civil servant, she arrives from the Financial Reporting Council.

That said, we mustn't prejudge—and I would certainly not envy the overflowing in-tray waiting for her.

## Yet More Regulation?

So far, there's little evidence that these changes will ease the regulatory burden on solicitor's firms. On the contrary, the fallout from Axiom Ince is expected to lead to:

- Restrictions on individuals occupying multiple roles across ownership, management, and compliance
- Expanded requirements for annual accountant reports
- New notification obligations when there are mergers or acquisitions

## Some positive news...

Amid the regulatory mayhem, a rare ray of sunshine. The government's newly published Industrial Strategy recognises that the legal sector is one of the UK's thriving areas of growth.

It has acknowledged that the money laundering regulations that we operate under are a burden and that the rules need to be proportionate to the risks involved. As a result the government is saying that it will bring forward a package of changes to the money laundering regulations by the end of the year. No details are given, but it is one straw of hope to cling onto. ■

**Peter Watson-Lee**

Law Society Council Member for Dorset



### **PRACTICE MANAGERS/MANAGING PARTNERS/ HRMANAGERS/COLPS/COFAS – WHATSAPP FORUM**

A platform for discussing best practices, share information and seek advice on issues specific to these roles.

If you would like to join this group, please email [mandy@bournemouthlaw.com](mailto:mandy@bournemouthlaw.com) with your mobile number



# Getting started with reverse mentoring: top tips and tools

Many legal organisations are working hard to improve inclusion and wellbeing - but knowing what really makes a difference can be difficult.

**Reverse mentoring** is one approach that offers a fresh, people-focused way to drive change. It helps senior staff hear directly from others, build trust, and better understand what it's like to work in their organisation.

## What is reverse mentoring?

In reverse mentoring, junior staff or people from underrepresented backgrounds mentor more senior colleagues. It's a way to have honest conversations, share experiences, and make sure everyone's voice is heard - especially those often left out of important conversations and decisions.

This type of mentoring recognises personal experience as valuable knowledge. It helps leaders better understand their people and how the workplace affects them. It's not always easy - but when done well, it's powerful.

## Top tips for running a reverse mentoring scheme

If your legal organisation is thinking about reverse mentoring, here are six key things to keep in mind:

### 1. Take your time

Don't rush into it. Involve a mix of voices when planning your scheme so it reflects a range of experiences.

### 2. Seek diverse views

Go beyond the usual perspectives. Make space for underrepresented groups to help shape the programme from the start.

### 3. Build trust first

Relationships matter. Everyone involved needs to feel safe, respected, and supported before they share personal experiences.

### 4. Support your mentors and mentees

Offer practical help - time, quiet spaces, and guidance on how to structure meetings - to ensure the project supports mentors to feel confident and heard and mentees to listen.

### 5. Focus on action

Don't let good conversations go to waste. Make sure there's a clear process to turn insight into meaningful change.

### 6. Celebrate and share

Mark progress, reflect on what's been learned, and show this is just the beginning of longer-term culture change.

## Need support? Try the new Reverse Mentoring Toolkit

To help legal workplaces run impactful and thoughtful reverse mentoring schemes, **LawCare** and the **University of Leeds** have created a free, practical **Reverse Mentoring Toolkit**.

The toolkit is packed with practical resources to help you design, launch, and sustain an impactful reverse mentoring programme. It will help you:

- Understand what reverse mentoring is - and what it isn't
- Create a safe, respectful space for honest conversations
- Support mentors and mentees throughout the process
- Turn insights into meaningful action
- Avoid common mistakes

## Read more and download the toolkit today:

[www.lawcare.org.uk/reverse](http://www.lawcare.org.uk/reverse)

## Explore more resources on the University of Leeds reverse mentoring project page:

<https://essl.leeds.ac.uk/directory-record/1234/partnerships-for-cultural-change-reverse-mentoring-in-higher-education-and-the-legal-profession>

## Who is the toolkit for?

The toolkit is for any **legal organisation** - whether a large law firm, small practice, in-house team, barristers' chambers, or legal education provider. You don't need a big HR team or budget to start a reverse mentoring programme. What you do need is a commitment to inclusion, an openness to listening, and a willingness to act on what you learn. Whether you're just starting out or looking to refresh an existing initiative, the toolkit can help you build a programme that is thoughtful, sustainable, and genuinely inclusive.

**"This toolkit is such a valuable resource, especially for HR, EDI teams, and senior leaders looking to build more inclusive, supportive workplaces. It provides clear, practical advice on how to set up and get the most out of reverse mentoring. By taking part, you're not only investing in your own growth, but you're also helping to shape a more inclusive, dynamic, and forward thinking legal sector for the future."**

Trish McLellan (Director of Engagement at LawCare)

## Ready to get started?

Reverse mentoring isn't a tick-box or a quick fix - but it can be a powerful way to build trust, highlight what needs to change, and make your workplace fairer for everyone. ■

## LawCare is the mental health charity for the legal sector

# LawCare

LawCare offers free and confidential emotional support, peer support, and information to people working in law in the UK.



LawCare helpline; 0800 278 6888



Online chat: [www.lawcare.org.uk](http://www.lawcare.org.uk)

You can also email [support@lawcare.org.uk](mailto:support@lawcare.org.uk). The helpline is open Monday to Friday, 9am to 5pm. All calls and chats are answered by trained volunteers with direct experience of the legal sector.

Free, confidential, non-judgemental emotional support for anyone working in a legal environment. We provide a space for you to talk through whatever is on your mind. We can also signpost you to other support agencies. Please contact any of the following:



**Mark Kiteley**  
[mkiteley@rawlinsdavyreeves.com](mailto:mkiteley@rawlinsdavyreeves.com)  
Tel: 01202 558844



**Sally Crawford**  
[Sallycrawf@gmail.com](mailto:Sallycrawf@gmail.com)  
Tel: 07973 148264



**Edward Holmes**  
[egholmes@meesons-spurlings.co.uk](mailto:egholmes@meesons-spurlings.co.uk)  
Tel: 01425 484420



**Maddy Longland**  
[ml@mjlplaw.co.uk](mailto:ml@mjlplaw.co.uk)  
Tel: 01202 842929



**Mandy Heath**  
[mandyjheath@hotmail.co.uk](mailto:mandyjheath@hotmail.co.uk)  
Tel: 07763 833256



**Lauren Annicchiarico**  
[lauren@frenchlawmatters.co.uk](mailto:lauren@frenchlawmatters.co.uk)  
Tel: 07764 582128



**Alan Turle**  
[a.turle51@gmail.com](mailto:a.turle51@gmail.com)  
Tel: 07720 406962



**Sarah Unsworth**  
[Bacchante2012@gmail.com](mailto:Bacchante2012@gmail.com)  
Tel: 01590 676933



**Maria Evans**  
[maria.evans@trethowans.com](mailto:maria.evans@trethowans.com)  
Tel: 01202 338580



**Marie Harder**  
*(mental health first responder)*  
[mharder@coles-miller.co.uk](mailto:mharder@coles-miller.co.uk)  
Tel: 01202 338885



**Liam Fennessey**  
[lf@prestonredman.co.uk](mailto:lf@prestonredman.co.uk)  
Tel: 07776 653645



**Fiona Pawsey**  
[fiona@newnham-jordan.co.uk](mailto:fiona@newnham-jordan.co.uk)  
Tel: 07891 584843



**Nicola Lowe**  
[Nicolalowe@hgwalker.co.uk](mailto:Nicolalowe@hgwalker.co.uk)  
Tel: 01202 881454 or 07854 787358  
(outside office hours)

## BDLS MEMBERS' BENEFITS



Did you know as a member of BDLS, you can take advantage of the corporate rate with BH Live leisure centres? The monthly cost is £38, as opposed to the usual fee of £45. This includes use of the gym, swimming pool, spa and classes across all their sites in Bournemouth and Poole.

Please visit their website for full details <https://bhliveactive.org.uk/join>

If you would like to join, please email me at [mandy@bournemouthlaw.com](mailto:mandy@bournemouthlaw.com) and I will provide you with an email to confirm your membership with BDLS.

We hope to soon be able to offer further membership benefits so watch this space!



# BDLS LEGALRUNNER GROUP



On the morning of 10 July, before the BDLS Compliance Conference got underway, a group of enthusiastic legal professionals laced up their trainers and took to the sands of Bournemouth beach for a scenic and energising 5K run—a perfect way to start a sunny Thursday!

The event wasn't just about fitness—it was about connection, wellbeing and celebrating the legal community in a more informal, active setting. Inspired by the success of the run, Kate Lewis is now launching a BDLS Legal Runner group, open to all that work within the local legal community

Working in the legal sector can be both challenging and rewarding. Lawyers often find themselves isolated due to the nature of their work, the issues of confidentiality and work related pressures and deadlines. Finding time to exercise and unwind is important. Running with someone who understands your concerns and pressures may help overcome the feeling of isolation and help create a safe space for you. The LegalRunner network is focused on support, collaboration, inclusion, accessibility and inspiration... and of course, fun and positivity!

Further details will be emailed to members soon. In the meantime, if you're interested in joining the BDLS Legal Runner group, please contact Kate Lewis at Trethowans. [Kate.Lewis@trethowans.com](mailto:Kate.Lewis@trethowans.com) ■

**Kate Lewis**  
Trethowans



# Firms' News

## Paris Smith Opens an Office in Avalon House

**P**aris Smith has now opened an office in Bournemouth's landmark, Avalon House; joining its offices in Southampton and Winchester. The new Bournemouth office will be an all service offering that includes corporate and commercial, employment, family, property, dispute resolution and private client services.

Staffed by a number of Dorset based lawyers and led by Poole resident partner, Frank Prior, the new office will improve the firm's offering to its existing Dorset clients and attract new ones.



*Hatice Tas, Andrew Willshire, Zoe Culverwell, Huw Miles (Managing Partner), Sue Murphy, Imogen Thomas, Frank Prior and Peter Taylor (Senior Partner)*



## Laceys expands their Wills, Probate, Trusts and Tax team

**L**aceys are proud to announce the expansion of their Wills, Probate, Trusts and Tax team with the addition of Rebecca Suthers and Laura Neerunjun - two highly skilled legal professionals who bring over 40 years of combined experience with them.

### Meet Rebecca Suthers

Rebecca, who joins the firm as a Partner and Chartered Legal Executive, specialises in Lifetime Estate Planning, asset protection, and creating lasting strategies for individuals and families. Known for her approachable and thoughtful style, Rebecca is a trusted advisor, even with the most complex estates and trusts.

### Meet Laura Neerunjun

Laura, who joins the firm as an Associate, offers expert guidance on Wills, Lasting Powers of Attorney, inheritance tax planning, and estate administration. Her empathetic and detail-oriented approach ensures clarity and peace of mind for clients navigating sensitive situations.



*Rebecca Suthers and Laura Neerunjun*

**LACEYS SOLICITORS**



# Firms' News

## Fiona Knight's Wacky Charity Wing Walk!

**A**fter being knocked off her bike a year ago, fracturing her hip 3 weeks into her retirement, Fiona Knight, ex-President and Treasurer of the BDLS, has had to abandon a 1,000 mile charity cycle around Scotland scheduled for September this year. Determined to support the East Dorset Branch of Parkinson's UK, Fiona chose to honour the memory of her late brother, uncle, ex-partner's mother, and a dear friend - all of whom were affected by the disease. Parkinson's is a degenerative brain disease that affects muscle control amongst other symptoms and for which there is still no cure.

What to do? A single event is a lot less preparation than a 1,000 cycle ride. By chance Fiona was in the Cotswolds and there was a slot free for a Wing Walk at Aerosuperbatics. Meant to be?!

Wing Walking dates back to the 1920's in America and the early aviators like Lindbergh took part. It was introduced into the UK over 40 years ago by Vic Norman who founded Aerosuperbatics at Royal Flying Corps Rendcomb Airfield. 10 miles outside of Cirencester. Rendcomb was opened in 1916 as by then so many pilots were being lost on the Western Front in WW1, new training facilities had to be found to train replacement aircrew.

Fiona was blessed with amazing weather and it was all smiles to start with!

1st Briefing by International Wing Walker Kirsten (recently featured in BBC TV series). She was on top of the biplane which had to ditch into the water at Sandbanks Ferry at the Bournemouth Air Show in September 2021. No worries then!

2nd Briefing by Pilot David. He was flying the biplane which came down and flipped in Poole Harbour in 2021! Oil pipe failure caused a complete loss of power investigators found. Good Fiona is not superstitious!

It had all seemed a good idea at the time to Fiona! Story of her life! Note to herself – stop thinking!



*From fractured hip to flying high — Fiona Knight takes on a daring Wing Walk to raise funds for Parkinson's UK*

Fiona felt really scared when being strapped in but too late to change her mind! Her hands remained tightly clenched around the small seat rest for the entire journey but it was all in a good cause – East Dorset Branch of Parkinson's UK. Whilst up there, she thought of all that people with Parkinson's Disease go through along with their family and friends. Amazing views over the Cotswolds and she made it! What a relief! What an amazing experience.

Fiona says thanks for members' interest, support, encouragement, and kind donations. She could not have done it without you. £3,700 has been raised so far for the local branch of Parkinson's UK for their local projects making it all so worthwhile. Her Just Giving page is still open:

[https://www.justgiving.com/page/fiona-knight-7?utm\\_medium=FR&utm\\_source=CL](https://www.justgiving.com/page/fiona-knight-7?utm_medium=FR&utm_source=CL)

Fiona's husband Charlie is hoping she does not have any other map cap brain waves! Watch this space! ■



# Firms' News

## Steele Raymond New Partners

**S**teele Raymond has further expanded its senior leadership team with the appointment of three new partners: Chris Marsden, Matt Crampton, and Chris Reeves. These key hires support the firm's ongoing growth strategy and strengthen its capabilities across Property Disputes, Private Client, and Construction teams.

Chris Marsden joins the firm's Property Disputes team, bringing over 17 years of experience in resolving complex property disputes. Formerly a partner at Moore Barlow, Chris specialises in delivering pragmatic, commercially focused outcomes for clients and will play a pivotal role in further developing Steele Raymond's contentious property offering.

Matt Crampton joins the Wills, Trusts, and Probate team as a partner, following his role at Laceys Solicitors. With expertise in complex estate administration, succession planning, and powers of attorney, Matt enhances the firm's private client services team.

Chris Reeves has been appointed partner and team leader of Steele Raymond's newly established Construction team. He joins from Reeves James, a specialist construction law firm recently



*L-R: Matthew Crampton, Chris Marsden, Jennifer Rogerson and Chris Reeves*

acquired by Steele Raymond. Dual qualified as a Solicitor and Fellow of the Chartered Institute of Building, Chris brings deep sector expertise in construction dispute resolution, including contractor claims, professional negligence, and technically complex disputes. ■

**SteeleRaymond**

## Shinade Street and Emily Bartlett joins HK Law

**H**K Law are delighted to welcome Shinade Street to their Land team in the Poole office and Emily Bartlett to their Private Client team in Bournemouth.

Shinade is a Chartered Legal Executive with expertise in all aspects of residential conveyancing, including sales, purchases, re-mortgages, and transfers of equity. Known for her approachable and proactive style, she is dedicated to guiding clients smoothly through their property transactions.

Emily is a Solicitor specialising in Wills, Powers of Attorney, Probate and Estate Administration. She brings with her a calm, compassionate approach, and a commitment to providing tailored advice during what are often challenging moments in life. ■



*Geoff Bates, HK Marketing Director, with Shinade Street*



*Peter Stagg, HK Partner, with Emily Bartlett*

**hklaw**

# Firms' News

## Legal secretaries begin their training contracts

**T**hree legal secretaries at Preston Redman Solicitors will commence their training contracts in September 2025: Elicia Gravett, Alexander Ayoub and Katherine Hellewell.

**Alex** has been with the firm since August 2024 as a legal secretary in the Commercial Property team. His first seat will be with the Civil Litigation department where he will be supervised by Hugo Haub and Lousie Boyle. Alex holds a business degree from the University of Exeter, a Post Graduate Diploma in Law and is currently in the midst of his SQE studies alongside his Training Contract.

**Elicia** has been with the firm since 2023, after graduating with a Law degree from the University of Sussex. Elicia's first seat will be in the commercial property department supervised by Jeremy Clough. Elicia is currently completing the Legal Practice Course and Masters at the University of Law.

**Katherine** joined in August 2024 working in the property department. Katherine's first seat will be in the property department supervised by Jodie Lillington. Katherine completed her law degree at the University of Exeter graduating in 2022 and completed her Legal Practice Course and Masters in Law at the University of Law with distinction in 2024.



*L-R Elicia Gravett, Alexander Ayoub and Katherine Hellewell*

We wish them all the very best as they take this exciting next step in their legal careers. ■



## Preston Redman Solicitors – Trainee Solicitor qualifies

**P**reston Redman are delighted to share that Jshan Kumar qualified as a solicitor in August. Jshan joined the firm in June 2022 as a legal secretary in the Private Client department before becoming a trainee in August 2023. He has completed seats in the Property, Litigation, Private Client and Corporate department. Jshan attained his Law Degree at Bournemouth University and has recently completed his Legal Practice Course and Masters in Law at BPP University alongside his training contract.

Jshan will be qualifying into the Corporate Department led by Jeremy Clough and Mark Lello. ■



*Jshan Kumar*





# Firms' News

## Ellis Jones Solicitors appoints Henrietta Frew as Partner

A regional law firm has promoted a key member of its banking and finance litigation department to Partner. Ellis Jones Solicitors has appointed Henrietta Frew to the top ranks of its management team in recognition of her hard work, talent and contribution to the success of the company. She has become the 24th Partner at the 183-strong firm, seven years to the month in which she joined. Henrietta started at the company in July 2018 as a Solicitor before being promoted to Associate in 2020 and Senior Associate in 2021. She acts on a diverse range of legal matters with specialisms in commercial disputes, health and social care disputes, banking and finance litigation and professional negligence claims. ■



Henrietta Frew

## Celebrating 25 Years of LA Marine

In 2025, LA Marine proudly marks 25 years as Lester Aldridge's specialist marine and shipping law team. Operating from the firm's Southampton, Bournemouth, and London offices, the team combines local accessibility with international reach, delivering seamless support wherever clients operate.

LA Marine was founded when Lester Aldridge recruited three experienced shipping lawyers to establish a dedicated marine and shipping law practice at its new office in Southampton. Over the years, the team has expanded its expertise and innovated in marine law, pioneering solutions for leisure marine operators and advising on emerging issues in commercial shipping and logistics. Today, LA Marine's legacy continues under the leadership of partners Linda Jacques and Philippa Langton, who bring decades of specialist experience. Earlier this year, Nicky Nelson joined as Partner in Southampton, bringing over 35 years of experience, including 22 years as Director and General Counsel of the Royal National Lifeboat Institution (RNLI). Supporting the partners is a skilled team of solicitors, including Elisabetta Scanferla, Helen Whitaker, Jessica Slater, Sasha Rusakova, and Stephanie Flemming. ■



LA Marine partners Philippa Langton, Linda Jacques and Nicky Nelson at the team's 25th anniversary celebration



# Situations Vacant



is looking for a

## Private Client Solicitor, FILEX, Paralegal

**Job Types:** Full-time, Permanent

**Expected hours:** 35 per week

### Purpose of the role:

Our busy office in New Milton is seeking an experienced and highly motivated Private Client lawyer either practicing as a Solicitor, Legal Executive, Probate Practitioner or an experienced Paralegal to work alongside our existing teams.

The ideal candidate would have a minimum of 2+ PQE with a very high standard of output in all areas of work. Together with a strong and successful billing history and who is genuine, caring and attentive to clients.

We are a family run firm of solicitors who understand the need to ensure a healthy work life balance and who offer an approachable and collaborative working environment where we are keen to support and foster talent and provide progression.

### Role Description; includes but is not limited to:

- Managing your own caseload undertaking fee earning work in all aspects of private client work. To include Wills, Probate, Trusts, Tax planning, Guardianship, Lasting Powers of Attorney, and Court of Protection work.
- To be motivated and enthusiastic to help drive the development of the department and work together to assist the rest of the team across both offices (Salisbury and New Milton).
- To maintain existing relations with the firm's clients and be active in business development in gaining new clients and growing own caseload

### Key Skills:

- Strong communication skills with a genuine, caring approach to clients.
- Excellent IT proficiency
- Eye for detail and attention to client care
- To be proactive and self-motivated.

### Salary:

Negotiable depending upon experience and qualifications

### Benefits:

- Competitive pay
- 25 days holiday plus bank holidays (includes Christmas shut down)
- Bonus days leave on your Birthday (or nearest working day)
- Employee discount on legal services
- Sick pay scheme
- Supportive and collaborative working environment

Please reply to [hr@rg-law.co.uk](mailto:hr@rg-law.co.uk) with CV ■

# MAKING LAWFUL DECISIONS

## A guide for decision-makers on acting within the law

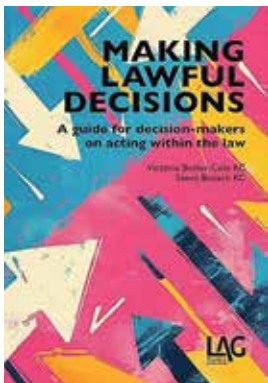
LEGAL ACTION GROUP

The access to justice charity

By Victoria Butler-Cole KC and Steve Broach KC

LAWYER OR NOT, A DECISION MAKER NEEDS TO KNOW THE LAW

An appreciation by Elizabeth Robson Taylor MA of Richmond Green Chambers and Phillip Taylor MBE, Head of Chambers, Reviews Editor, "The Barrister", and Mediator



**If you have found yourself — or your client — in the position of being appointed as a decision-maker over a number of issues in either the public or private sectors, you need this book, recently published by the Legal Action Group (LAG), the access to justice charity, who are justly famed for producing legal texts accessible not only to lawyers, but to the average concerned reader.**

Pertinent, applicable and directly accessible to lawyers and non-lawyers alike, this book emerges as an essential guide — no doubt about that — to both the basics and the possible

and probable complexities which, more often than not, are likely to emerge in the decision-making process.

With depth and clarity, a wide range of issues are discussed, with a focus on the most controversial, including for example, cases pertaining to equality and human rights. The book therefore covers a lot of ground in explaining an extensive and complex subject, with the thoroughness and clarity that makes it accessible to all decision-makers — lawyers and non-lawyers alike.

As the LAG explains, the book's overall aim is to ensure that "a decision-making process follows a lawful process." And that includes, appropriately, answers to the problems of those who are aggrieved by a decision and therefore considering a complaint, or a legal challenge.

The first chapter to turn to is the 'Checklist' and an invaluable checklist it is. Certainly, it covers such necessities as powers, problems, evidence and much, much more, including what to do if your decision is challenged — a challenge indeed.

Certainly, this compact volume provides a treasure trove of useful resources for further research. Note the almost twenty pages of Tables of Cases plus the Table of Statutes and Statutory Instruments - and a Table of European and International Instruments. Also note the handy index, the glossary of legal terms and the extensive footnotes — indispensable if more detailed research is required — and it usually is, in so many circumstances.

"A guide for decision makers on acting within the law" is the book's subtitle and an excellent guide it is. Any lawyer advising clients embroiled in these or similar problems should very quickly acquire a copy. ■



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# Don't Let Your Law Firm's Data Be Held Hostage



## Why data ownership and portability should be at the heart of your legal software choices

In today's digital-first legal landscape, case files, billing records, and sensitive client information rarely live in a filing cabinet; they're locked inside the systems you use every day. But here's the real question: *Do you actually own that data?* And if you ever need to switch software, *can you get it out easily?*

If that made you pause, good. You're not alone. Far too many firms sign up to legal software without knowing what happens to their data if they ever decide to move on. So let's break it down.

### Your Data. Your Rules?

Data ownership sounds obvious; you enter it, so it's yours, right? Not always. Once data lives in a third-party system, ownership can get murky fast, especially if your contract doesn't explicitly state your rights.

For law firms, this isn't just an IT headache, it's a compliance risk. Your data contains confidential client details, financials, and internal strategy. If your provider controls access, that's a problem waiting to happen.

**What to look for:** Contracts should make it crystal clear that you own all data, and that you have full control over it—even if you end the relationship. Anything less? Red flag.

### Portability: The Power to Move On

Even if you own your data, that doesn't mean it's easy to get it out. That's where data portability comes in; the ability to export your data quickly, cleanly, and in formats that *actually work elsewhere*.

This matters when you:

- Outgrow your current system
- Want a better fit for your growing team
- Need to back up your data independently
- Face new regulatory obligations

Without portability, your firm could be stuck in a system that no longer serves you; paying extra to retrieve data that should've been yours all along.

### Ask yourself:

- Can you export your data easily?
- Will it work in other systems (e.g. CSV, PDF)?
- Will it cost you a fortune to do so?
- Is data transfer secure and GDPR-compliant?

If you're not getting straight answers from your provider, it might be time to start asking tougher questions.

### Switching Doesn't Have to Be Scary

Many firms fear the pain of switching. But with the right provider (one that values transparency, offers standard export options, and supports firms during onboarding) the process doesn't have to be a nightmare.

Look for a provider who:

- Offers free or affordable data export
- Uses open, industry-standard formats
- Has clear policies around contract termination and data return
- Is happy to talk specifics, not just sales jargon

### The Bottom Line

Your data is one of your firm's most valuable assets. You should never have to beg, bargain, or overpay to access it.

So before you renew another long-term contract or sign on the dotted line with a new vendor, ask the right questions.

Understand the fine print. And make sure your firm's future isn't being quietly tied up in tech you can't walk away from.

### Ready to regain control of your firm's data?

Clio gives you full ownership and secure, straightforward data portability—no strings attached.

Visit [Clio.com/uk](https://clio.com/uk) to learn more. ■



# TRIBUNAL PRACTICE AND PROCEDURE

## Tribunals under the Tribunals Courts and Enforcement Act 2007

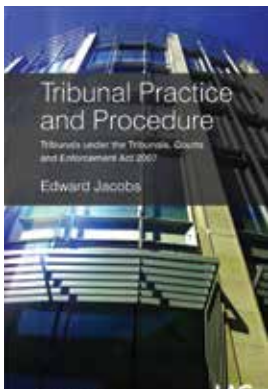
LEGAL ACTION GROUP

6th edition

By Edward Jacobs

CONFUSED BY THE COMPLEXITIES AND CONTRADICTIONS OF TRIBUNALS? THIS DEFINITELY IS THE DEFINITIVE GUIDE NOW PUBLISHED IN A NEW 6TH EDITION

An appreciation by Elizabeth Robson Taylor MA of Richmond Green Chambers and Phillip Taylor MBE, Head of Chambers, Reviews Editor, "The Barrister", and Mediator



**T**here is many a lawyer whose practice generally -- and almost invariably -- is concerned mainly with court work. But, while this is mostly the case, most lawyers, more often than not, do find themselves involved, often frequently, in the workings and procedures of a tribunal -- which generally differ somewhat from the procedures of the courts.

Fortunately the clarification of this important point is dealt with extensively, authoritatively and in detail in this book which, now in its 6th edition, has proved itself over the years as an essential and certainly authoritative source of reference for

any and all practitioners finding themselves dealing with tribunals, as it clarifies what a tribunal is and what it does -- while pointing up the often subtle differences between the two.

In which case, the sensible and well informed course of action on the part of the practitioner is to acquire this book. Recently published by the Legal Action Group (LAG), it has over six editions, emerged as the definitive work on this often

confusing area of practice, with an authority that is largely unchallenged.

The fact that it has acquired such a lengthy publication history offers assurance that it's the definitive work indeed in this often complex subject, as the practice and procedure of tribunals has undergone certain changes over the years. As LAG confirms, this is 'the most comprehensive and authoritative guide to the integrated Tribunal system, created by the Tribunals, Courts and Enforcement Act 2007.'

So what then, are the differences between a court and a tribunal?

There's many a lawyer who has, almost inevitably, enquired as to what the precise difference actually is. The immediate answer is that there is 'no general definition in this specific sense of its general features.' Or, as pointed out in the past by another member of the judiciary, 'the word "tribunal" has not, like the word "court" an ascertainable meaning in English law.'

This is arguably a traditional view which some might dispute. But whatever the argument, knowledge of the workings of contemporary tribunals is nonetheless essential for the interested and committed practitioner. And this is the assurance that this book provides.

It is certainly an impressive work of reference, offering extensive tables of cases, statutes and statutory instruments, plus a table of European and international legislation and -- important this -- a table of abbreviations! Plus, the book is easy to navigate, with a detailed table of contents, numbered paragraphs throughout, a detailed index and for further clarification and for those doing research, a wealth of footnotes on almost every page.

Most importantly, there are two appendices, commencing with Appendix A, which features over seventy pages -- the Tribunals, Courts and Enforcement Act 2007. Equally vital is Appendix B -- The Tribunal Procedure (Upper Tribunal) Rules 2008.

This thorough, useful and informative text certainly deserves the definition of indispensable -- for any practitioner embroiled in the often complex issues which characterize contemporary tribunals.

And also, in the tradition of LAG, this is a work of reference which can certainly prove helpful to litigants in person. ■

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# LEAP Estates Launches 2025 Will Writing Trends Report

## Gifts, Charities, Exclusions and much more

**L** EAP Estates announces the launch of its 2025 Annual Report, offering a comprehensive snapshot of will writing activity and trends across England and Wales. The report is based on anonymised data from over 200,000 wills and more than 400,000 total documents, providing useful demographics and information relating to Estate planning, plus a range of fascinating trends. These trends include insights into charitable gifts, the frequency of branded gifts bequeathed, such as Rolex watches and Pandora jewellery, and family members excluded from Wills.

AI has a profound impact on staff productivity. Human resources are the most expensive and vital asset in any law firm. By taking over repetitive, low-value tasks like legal research, document drafting, and even matter analysis, AI allows lawyers to focus on higher-value activities that require human expertise. AI-driven research tools, for instance, sift through vast legal databases in a fraction of the time it would take a lawyer, offering comprehensive insights while reducing possible errors from lapses in human concentration.

This latest edition of the report draws on unique insights gathered through WillSuite, LEAP Estates' key integration partner. Since its integration into LEAP Estates and LEAP Legal Software in 2023, WillSuite has generated more than 900,000 wills and 1.7 million legal documents, with approximately 7,000 new documents being drafted every week. The software enables professionals across the estate planning industry to work more efficiently by reducing duplication, minimising errors, and ultimately delivering an improved service to clients.

Craig Matthews, CEO LEAP Estates/WillSuite says,

"For the first time we've been able to combine data from our LEAP, LEAP Estates and WillSuite users to bring about our largest report to date. Seeing an eight-fold increase in documents produced through our combined platform in just four years is really exciting and a testament to the hard work that goes into the development and support of our products."

The 2025 report explores a wide range of valuable facts and trends shaping the estate planning process. It covers key demographic insights, the types of trusts being included in wills, the frequency of charitable legacies and exclusions, and provides detail on funeral wishes and organ donation requests. It also highlights patterns in popular gifts and the specific brands frequently mentioned by testators. This data offers not only practical insight for the profession but also a fascinating perspective on evolving societal habits and values.

Among the most frequently gifted items in wills over the past year were cash, property, pets and chattels. Beyond these, the ten most popular specific gifts included jewellery, wedding rings, engagement rings, watches, and cars, followed by records, bonds, coins, instruments and medals.

The average mean value of a gift in 2024 was £15,138, calculated from 46,976 cash gifts included across 208,793 wills. Where specific brands were named, the most cited were Rolex, Pandora, Tag Heuer and Omega. Brands were more likely to be specified when the gifts related to jewellery or watches, whereas vehicles were typically described as "the family car".

The LEAP Estates 2025 Annual Report offers essential insights for professionals and an engaging look at the ways people in England and Wales are planning their legacies.

To access the full report, <https://www.leapestates.co.uk/brochures/annual-report/>. ■



**By Craig Matthews**  
CEO, Leap Estates/WillSuite

# LEGAL AID HANDBOOK 2024/25

## The 2024 Standard Civil Contract and The 2025 Standard Crime Contract

LEGAL ACTION GROUP

The access to justice charity

By Vicky Ling, Sue James and Simon Mullings

CONFUSED BY THE COMPLEXITIES OF LEGAL AID?  
THIS IS THE ONLY COMPREHENSIVE GUIDE TO THE LEGAL AID  
SCHEME -- NOW IN ITS NEW ANNUAL EDITION FOR 2025



An appreciation by Elizabeth Robson Taylor MA of Richmond Green Chambers and Phillip Taylor MBE, Head of Chambers, Reviews Editor, "The Barrister", and Mediator

**// Without legal aid, there is no access to justice.** In their terse and to the point introduction to this latest edition of the celebrated "Legal Aid Handbook" (published annually), editors Vicky Ling, Sue James and Simon Mullings have certainly set out to remind everyone involved in the justice system of this painfully obvious and uncomfortable truth for the 2020s.

Legal aid and advice, as they rightly insist, is a public service, critical, indeed, to ensure the fairness of the justice system. One might add, in tandem with the editors, that legal aid is chronically and consistently underfunded, while at

the same time, its complexity increases. All the more reason why dedicated practitioners in this challenging and vital area of law should acquire this latest edition of the "Legal Aid Handbook 2024/25" published annually by the Legal Action Group (LAG).

The statement has been made -- and who could disagree -- that all busy practitioners involved with legal aid cases should have a copy of this Handbook permanently on their desks -- and so many do. Always have the most recent edition because the rules do change quite often. As the publishers point out, this is 'the only comprehensive guide to the legal aid scheme.' Within almost 800 pages the handbook provides all pertinent and specific advice on the conduct of cases, as well as advocacy and the practicalities of financial and contract management, plus advice on getting paid.

As the subtitle indicates, this new and updated edition provides advice on "The Standard Civil Contract 2024" and "The Standard Crime Contract 2025" -- and there's a new chapter on "what you need to know at a glance" which we found most helpful. Other new sections of the text include key resources and key points to note.

As a work of reference, including key chapters written by a total of thirteen expert contributors, including the editors -- this is a handbook that is more than useful, as it includes tables of cases, statutes, statutory instruments -- and a table of EU and international legislation. Straightforward to navigate, it also provides a list of abbreviations (very useful, that), a glossary, an index of seventy-five pages -- plus five appendices, which include advice on what you can claim for in civil, as well as criminal costs.

For all practitioners who handle legal aid cases, this newly published up to date and information-rich handbook should be regarded as an absolutely essential purchase. ■



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**T: 020 7837 0006**

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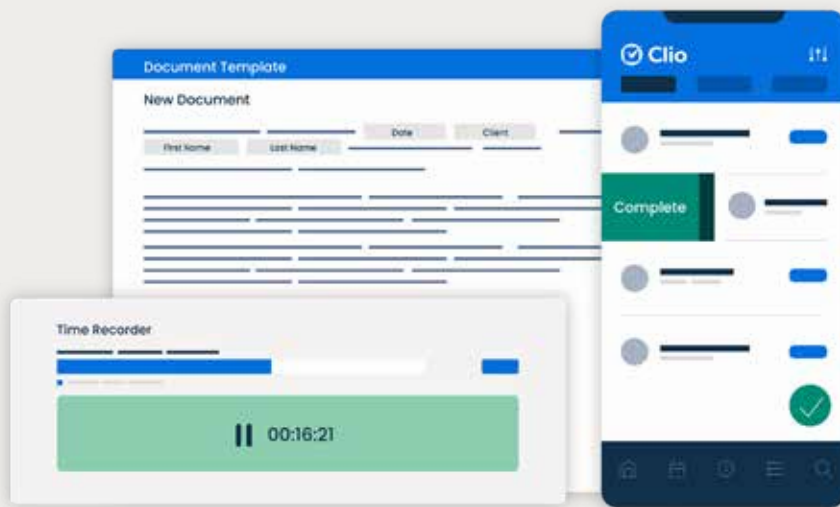


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**SHAINUL KASSAM**  
Firm Owner, Fortune Law



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